

Forbes Top RIA 2025 Disclosure

The Forbes Top RIA Firms 2025 ranking was published October 1, 2025 and covers the year 2025. Blue Chip Partners did not pay a fee to participate in the ranking. The annual Forbes list, developed by SHOOK Research, evaluates RIA firms based on qualitative and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. The ranking highlights independent firms that set a high standard for the wealth management profession.

The complete 2025 Forbes | SHOOK Top RIA list can be viewed [here](#).

The methodology used in the 2025 Forbes | SHOOK Top RIA list can be found [here](#).

USA TODAY Disclosure Link (2024)

USA TODAY's "Best Financial Advisory Firms 2024" was published on April 23, 2024, and is a ranking of registered investment advisory firms prepared by USA Today and Statista, Inc. The ranking is based on recommendations by financial advisors, clients and industry experts and a firm's development of Assets Under Management (AUM). Recommendations were collected via an independent survey among over 25,000 individuals, and self-recommendations were prohibited. AUM development was analyzed both in the short- and long-term using publicly available data from the SEC IAPD regulatory database. Short-term AUM development was calculated over a twelve-month period from January 2023 to January 2024, while long-term development spanned a five-year period from 2019 to 2024. The 500 RIA firms with the highest score were awarded as USA TODAY's Best Financial Advisory Firms. Organizations do not pay for, or need to apply, to appear on this list. Blue Chip Partners paid a license fee to USA TODAY to publicize the ranking. For more information on the methodology used visit <https://www.bluechippartners.com/wp-content/uploads/2025/02/AD2024-209-Methodology-USA-TODAY-Best-Financial-Advisory-Firms-2024.pdf>

USA TODAY Disclosure Link (2025)

The USA TODAY / Statista ranking is based on two dimensions: (1) recommendations by clients, industry experts and financial advisors, and (2) the RIA's growth in short-term (Jan. 2024 to Jan. 2025) and long-term (2020 to 2025) Assets under Management (AUM). Recommendations were collected via an independent survey among over 30,000 individuals. Clients, industry experts and financial advisors working for an RIA firm could recommend the RIA firms they find commendable. Self-recommendations were prohibited

and were therefore not included in the evaluation, and any events after February 13, 2025 were also not considered in the analysis. The final score was calculated by weighting recommendations at 20% and AUM development at 80%. Within the AUM growth metric, short-term and long-term growth were each weighted 30/70. The 500 RIA firms with the highest score were awarded as USA TODAY's "Best Financial Advisory Firms". The full 2025 ranking, including more information on the methodology used, can be found at the following link: <https://www.usatoday.com/story/money/2024/04/23/financial-advisor-top-firms-ranking/7332767900>

The National Association for Business Resources identifies and honors companies that, in their view, deliver exceptional employment practices and demonstrate an impressive commitment to their employees. Organizations are assessed based on categories such as Leadership, Strategy, and Company Performance; Community Initiatives and Corporate Responsibility; Recruitment and Selection; and Work-Life Blend. The NABR's assessment process includes the use of comprehensive employee surveys that allow for analytical reporting, comparisons with other companies across the nation, and opportunities to share knowledge. To be eligible for consideration, companies must: (1) have 20 or more employees to participate, (2) be in business for at least 3 years, and (3) be a for-profit or not-for-profit business or government entity. Organizations meeting the required criteria must apply with NABR to be considered for this award. Blue Chip Partners paid a licensing fee to NABR in order to review and evaluate our survey responses for national and regional award consideration. For more information, please visit the NABR's website: [Best and Brightest Companies to Work For | National Association for Business Resources](#).

“Crain’s Best Places to Work in Southeast Michigan 2024” was released 8/22/24 by Crains Detroit Business and is a survey and research-driven program in partnership with the Best Companies Group. Best Companies uses an employer questionnaire to examine applicant companies’ practices, programs, and benefits. Afterward, it surveys employees on engagement and satisfaction. Eligible companies are at least one year old, have at least 15 employees, and are located in Wayne, Oakland, Macomb, Washtenaw, Ingham, Livingston, Lapeer, Genesee, St. Clair, Monroe, Lenawee, or Jackson counties. No fee was paid to Crain’s Detroit Business or Best Companies Group for inclusion in the ranking